

How to use the ISNI web portal

Scope: Quick tips for using the ISNI web portal. For more detailed information, see <http://www.isni.org/content/resources-0>

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Versions of the web portal

We have access to two versions of the web portal:

1. ACCEPT is the **test** database. Training and experimenting should be done here.
2. PRODUCTION is the **live** ISNI database. Work performed here affects real records.

The web version of the ISNI database is sometimes referred to as "PSI" (PICA Search Interface).

Logging in

See [ISNI web links \(restricted access\)](#)

First time use: brings you to a screen that most likely will present with *browser security warning*. This can be ignored. Go to Advanced/make exception in browser settings (you should only have to do this once for each computer that you use)

Passwords

Password assignment

July 28, 2017: Harvard requested two logins per institution as a first pass, just so that a manageable request would go into OCLC such that we could be assured of quick turnaround on the initial 30 logins. We'll be back in touch with them shortly to supplement logins for institutions that will have many practitioners involved in the pilot.

Note that ISNI has not required or in our experience so far provided individualized logins. At Harvard, we have assigned individuals to specific logins so that we could troubleshoot any issues with ISNI activity while using the WinIBW client, but otherwise, sharing logins seems not to be a problem, other than potentially conflated searching histories.

Changing passwords

July 24, 2017: At this time it is possible to change passwords in the WinIBW client only, it is not possible to change passwords in the web interface. Apologies for the confusion.

Searching

[Documents Related to Database Enquiry](#): See file: [ISNI search guidelines.pdf](#)

See also [Pilot 2017-18 documentation and training](#) and the Help link on ISNI web interface.

Editing a record

Click "edit record" on left.

If PCC (or HARV) is not already a source on the record, it must be added before any further editing of the record. (An exception is when you add a General Note on the External Information and Notes tab to send information to the ISNI quality team about errors, records to merge or split, etc.)

Click the + beside "Add Identifier"

"PCC" (or "HARV") is automatically added as "identifier type"; "identifier" field can be left blank.

Your institution's form of the name must also be added to the record, even if the form is already in the record.

Click the + beside "Add Name"

Add the form of name found in the PCC source in the boxes.

It is not necessary to click "Save changes" before going to one of the other tabs at the top of the record, e.g. "Personal Details," "Associations," etc.

Under Personal Details, you can add Dates, Language, Gender, or Nationality. All are **optional**.
Dates should be entered in ISO 8601 extended format, e.g. 2017-04-15. Dates can be truncated to a month (2017-04) or a year (2017).
Languages are entered with ISO 3-character codes, e.g. eng. ([Codes for the Representation of Names of Languages](#))
Nationalities are entered with 2-letter codes, e.g. US. ([ISO Online Browsing Platform](#); click Country codes button) or use [this Wikipedia page](#).

Under Associations, you can add relationships to other persons and organizations. You may see a box labeled "PPN." This stands for Pica Production Number, the system number in the ISNI database. To see the PPN for a particular record, click on "marc21" in the band above the record and copy the number from the 000 field. On records without an assigned ISNI, this is also the number that appears in the labels display as "Record no."

Under Works, you can add titles of works created by the person.

Under Class and Role, you can add a "Creation **class**", which is similar to RDA's content type. It represents the kinds of works a person has created. In spite of the pop-up information in the interface, information in some older documentation, and examples in some records, the latest information from ISNI is that we should use a two-letter code from the MARC leader bytes 06 and 07 (<http://www.loc.gov/marc/bibliographic/bdleader.html>)

There is a drop-down list for creation **roles**.

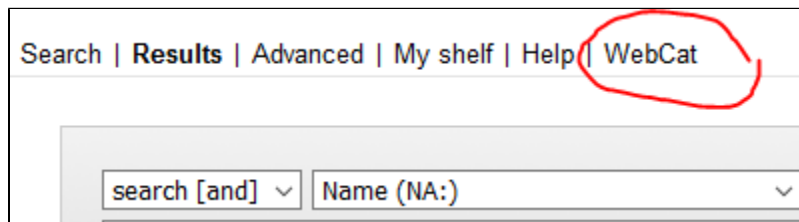
Under External Information and Notes, you can add outside sources, such as a website where important information was found. In the box marked "Information," enter an indication of the kind of source, such as "Wikipedia." In the URL box, give the URL for the source. For an IMDb page, enter "IMDb" in the Information box and the URL for the person in the URL box. Remove the parts of the URL that begin with a question mark, e.g. change "http://www.imdb.com/name/nm0825821/?ref_rvi_nm" to "<http://www.imdb.com/name/nm0825821/>"

When you have made your additions, click "Save record."
Clicking "Cancel" will send you back to the login screen.

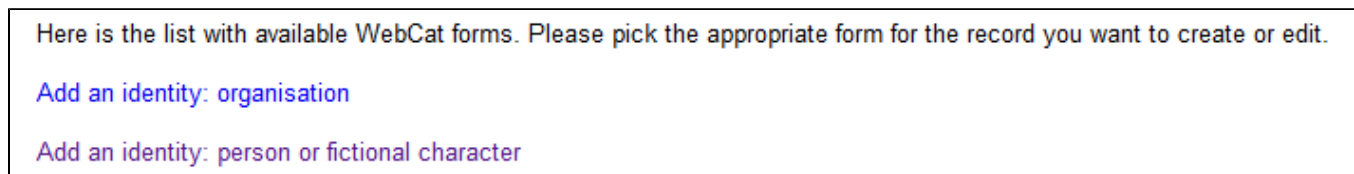
You cannot change information entered by another source (sources other than the one you are using, i.e. PCC or HARV).

New records

To enter a record for an identity that is new to ISNI, click "Webcat" at the top of the screen.



Click one of the two links, either for organizations (corporate bodies) or persons. This opens a one-page template that contains the fields found under various tabs when editing an existing record.



For more, see [Pilot 2017-18 documentation and training](#)

Merging records

The system may suggest records that might need to be merged.

See [Merging records](#).